INTELLIGENT AUTOMATION
NEW ORLEANS 2017

Change Management
Checklist
For Intelligent Automation

When disruptive technologies such as RPA, Intelligent Automation and cognitive technologies are first introduced, it's not uncommon for those spearheading such initiatives to encounter unprecedented levels of fear, confusion and resistance to change across all levels of the organization. With this in mind, we spoke to a handful of our 2017 Intelligent Automation New Orleans speakers about the road-tested change management strategies they leverage to not only drive adoption but spark cultural transformations. Below is a summary of what they shared:

Is Your Organization Ready for Change? 📋

Assess your organization's readiness for change, identify potential skills-gaps and find out what types of change management approach (i.e. big bang, tiered, etc.) have worked best for your organization in the past.

Speaker Insights 📣
Matt Gustitus, Director, Automation — Finance Shared Service Cente
Eli Lilly and Company

"[Implementing RPA] is not drastically different from other automation initatives, but having a dedicated team in the business to deliver is what makes this different than other change management processes we have today. One of the main challenges we face is how to divide up responsibilities when it comes to our change management process. We want to utilize our IT team, as well as our automation COE, and global process owners to drive speed and efficiency in our process."

👫 Are You Strategically Aligned ?

Work with business leaders to ensure automation strategies align with corporate objectives. Ensure leadership teams in actual agreement when it comes to RPA goals, timelines, resources and governance. Develop clear messaging around how IA benefits both the business and employees..

Speaker Insights 📣
John Cottongim, Automation Lead, AIG's Global Business Services — Automation COE

"The top priority when delivering complex Automation and AI solutions is foremost in preparing the business owners with a working knowledge in the proposed technologies and how such an engagement will differ from traditional improvement initiatives. "For instance, the upfront data requirements for such projects are frequently considerable, consisting of gathering, cleansing and tagging large volumes of historical data. This may come as a surprise to a business leaders who are typically focused on future thinking and only the most recent past performance.
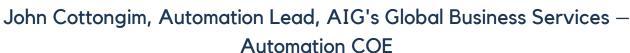
Assign Change Champions ⚙

The face of your IA transformation, ensure these change leaders are set up to effectively spearhead RPA process selection, organizational design, messaging and employee training.

Leverage Multidisciplinary Implementation Committees

Develop cross-functional steering committees to help engage stakeholders, set targets, prioritize projects, create governance frameworks and ensure the "voice of the customer" is heard.

Speaker Insights 📢

John Cottongim, Automation Lead, AIG's Global Business Services — Automation COE

"The pace of these programs is ever quickening and with it comes its own challenges. The speed of deployment is often limited not by the technical team, but instead by governance or procedural elements (both very much required when deploying in large firms or complex spaces). Having supporting team members from the various operational areas (e.g. IT, Legal, Risk), who understand the core technologies and can 'speak the language', is critical to enabling the solution team to quickly deliver the solution and the business teams to receive the best possible outcome from these projects."

Re-Envision Corporate Culture 👁

Define and communicate your vision for next generation shared services. Partner with HR to develop trainings to up-skill employees that emphasize both technical acumen and people management skills to ensure your workforce is equipped to navigate the future state of shared services

Establish and Communicate Governance Structure

Ensure new roles and responsibilities are clearly articulated and understood. Remember, an effective governance structure enables improved standardization, decision making and prioritization across the enterprise

Speaker Insights 📢

Matt Gustitus, Director, Automation — Finance Shared Service Cente
Eli Lilly and Company

"We were able to get leadership to agree that a central COE dedicated to RPA would allow us to be successful going forward. This includes internal talent as well as tapping into external talent. We are already seeing other parts of the business wanting to utilize RPA for their business areas. We have to rely on our central governance structure (in the Automation COE) to have the proper controls and support in the future."

Organizational Design and Talent Strategy

Translate business strategies into a workforce plan that takes into account changes in the way work is done, not just changes in required employee demand.

Speaker Insights 📢

John Cottongim, Automation Lead, AIG's Global Business Services — Automation COE

"Another challenge seen is that with new tools comes new terms and new ways to measure success. Meaningful time needs to be allocated to introduce the management team to the various models and associated success criteria, both of which will likely be for the first time."

Be Transparent and Open About Staff Changes

When it comes to staff transition, re-deployment, and/or release, be clear, consistent and prepared to answer the "will I lose my job" question.

Build a Long-Term, Sustainable Vision for Change

Remember, change is an ongoing process and doesn't happen overnight. A truly effective change management strategy drives innovation, continuous improvements and other transformational objectives beyond the initial implementation period. Ensure your change management frameworks is agile enough to evolve with your organization for years to come.

Speaker Insights 📣

Margaret Kilian, Director, Global Process Expert, Record to Report (R2R), UCB

"This project was mostly lead by our BPO in India (they are contractually obligated to deliver productivity savings, and robotics is one of the ways we are meeting this obligation). This is the first real project that the BPO has lead for us, so it was quite different from other automation projects. As a result, we had a few 'surprises.'

- We found out that our BPO was under-reporting rework on manual journal entries. They were reporting under 2% per month; however, when we implemented robotics for manual journal entries our rework sky-rocketed to 35% in the first month. We found that the humans who were posting entries were taking extra steps to handle blocked cost centers, GL accounts, etc. We re-mediated the issue by introducing control templates with certain pre-checks before the entries are sent to the robots.

- The robots are very inflexible. The file formats and naming conventions have to be EXACT or else the files will not work. It took a few months of sending the files to humans and then pushing through to the robots and reminding the users of the proper formatting, in order to increase the usage and success rate.

- We also found that seemingly-insignificant IT changes caused issues with Robotics. For example, IT pushed a change to our Outlook settings. As users, we didn't even notice it, but it caused the robots to not work at all. (The people send JEs to the robots' e-mail address, then the robots upload the files – but due to the changes in outlook settings, the robots were unable to receive the files properly in Outlook.) After this, we created a monthly checklist and scheduled a monthly recurring meeting between IT and Finance to check for any changes that may have a potential impact on the workings of the robots.

Meet Our Contributors

John Cottongim
Automation Lead, Global Business Services— Automation CoE
AIG

SESSION DETAILS
COE Master Class 501 B: How To Develop & Manage a Successful Intelligent Automation Center Of Excellence
Wednesday, December 6th at 11:00am

Matt Gustitus
Director, Automation — Finance Shared Service Cente
Eli Lilly and Company

SESSION DETAILS
What I Wish We Knew Before We Expanded Our Digital Transformation Programs
Friday, December 8th at 2:00pm

Margaret Kilian
Director, Global Process Expert, Record-to-Report
UCB, Inc.

SESSION DETAILS
Panel Discussion: Intelligent Automation To Enhance Financial Accuracy, Transparency & Productivity
Thursday, December 7th at 2:40pm